

Small Project Forum

Issue Number 10 April 1997

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Marketing

*Daniel Jansenson, AIA
Los Angeles, California*

These are times when getting work is as time-intensive as performing it. Studies have shown that it costs five to seven times less to get repeat work from existing or former clients than from new ones. Many firms are successful not only because they control their costs well, but also because they are able to get new work from existing clients. This requires that current clients be happy with the level of service you provide, something which is not always evident from clients' behavior. So, it may require extra effort to discover a client's level of satisfaction.

I have developed four broad goals to help guide my work. I use these goals as tests for evaluating project problems as they arise and, during heated moments, to remind myself of larger issues guiding my business. These are not original ideas; they've been culled from extensive readings in the business literature, and they've gained such widespread currency that they are practically clichés. Some of these ideas are discussed more thoroughly in the book *Smart Moves for People in Charge*, by Sam Deep and Lyle Sussman (Addison Wesley, publishers). They have also been very effective in my daily practice.

- *Stay focused on your clients' concerns.* Enter each project with an open mind and listen carefully to what your clients

tell you. If they say they want a two-car garage, it does not necessarily mean a three-car *porte-cochère* (it may, but you need to find this out). If your clients ask for certain styles, make sure you understand their concerns. They may be willing to explore other things, but they need to know you've heard their desires. Try to anticipate hidden needs, and make sure you respond to what you've heard. Throughout the project, accept clients' complaints with grace. Most of the time complaints are based on fact. Find out what the situation is, and try your best to resolve it. For me, an architectural practice solves problems, gives pleasure, and meets needs; it is not simply a vehicle for delivering products and services.

- *Exceed expectations.* Give clients more value than they expect. Often this requires only a small increase in the amount of work done, but makes a favorable impression on your clients. In addition, making many small gestures during a project will produce a positive overall impression. Charles Moore is reputed to have given a gift to his clients at the end of each project, often a small piece of artwork or sculpture. After all, a project consists of more than just providing a professional service. Finally, at the project's end, feel free to remind your client discreetly of the increased value they received.

- *Maintain the highest ethical and professional standards.* Don't discuss your clients' confidential business with anyone else. Don't gossip about the contractor with your clients. Make sure you are seen as fair, clear-eyed and direct about the project, its problems and pleasures. Be friendly and warm, but keep your professional standards clearly present at all times. Clients and contractors often make requests that require you to bend the rules. Don't. Be friendly but firm in explaining why you cannot accommodate such requests. Be up-front



about problems you encounter with anyone on the project (including the client), but approach them openly, with a focus on problem-solving rather than on placing blame. And be receptive to alternative solutions. Explain clearly the motives behind your decisions, and if you change your mind, explain why you did so.

- *Put everything in writing.* Keep a diary of important phone calls. Keep notes of all your project meetings. Put a date and time on everything. No need to write a college thesis, but a compact, thorough record keeps things on "the level" and helps answer and/or eliminate future controversies. Send copies of your meeting notes to all project participants. After an important telephone conversation with your client, send him or her a brief summary outlining what you've discussed. More good ideas which will make this process less laborious are published in *Time Management for Dummies*, by Jeffrey J. Mayer (IDG Books, publisher).

Don't be discouraged if you find it difficult to implement all these ideas all the time. Just keep in mind that they are tested tools that have kept clients and obtained repeat business. They allow you to maintain relationships on an even keel and create an environment of trust, making it easier for clients to call again.

State of the Forum

*Donald Wardlaw, AIA
Oakland, California
Chair, Small Project Forum*

The Small Project Forum is now entering its fourth year. For the past couple of years we have been hovering around 2,000 members, though each year brings new friends and colleagues to our effort.

Our purpose is to further our skill and success with respect to small projects. We practice in an area where involvement by architects is neither mandated nor universal. Hiring an architect needs to be seen, even more than it already is, as an informed and beneficial decision. Consequently, we aim to raise our proficiency in these small project areas. The Forum is where knowledge about our form of practice is sought and readily shared.

The Forum is very much a grassroots professional interest area. We don't offer tours of Paris or Peru disguised as executive retreats. We provide a venue for the exploration of issues affecting our practices, like marketing. Look at the bylines in this issue. Our authors are professionals from all over the country. According to our 1996 Survey, approximately 95% of Forum members are firm owners. The average firm size is 2.8 people, demographically representative of the AIA.

The Forum is led and managed by Forum members. The Advisory Group of three practicing architects functions as the executive leadership of the Forum and makes operating decisions. Each year one member leaves and a new one arrives to serve a three-year term. We openly solicit interested Forum members to apply.

I would like to extend thanks to James Donham, AIA; Peter Orleans, AIA; and Charles Matta, AIA, for their kind offers of service. All have fine, highly commendable qualifications. Hy Applebaum, AIA, has been selected as the new Advisory Group member this year. Applebaum brings

extensive talent and expertise as a practicing architect and a history of generous service to his community. We welcome Applebaum to the Advisory Group.

I would also like to commend a rather special group of Forum members, the Local Advisors whose names you see listed in this Report. They have invested valuable time toward realizing our efforts and assumed specific responsibilities as contributors to our publications. If you know or see any of them, be sure to thank them for their service.

If any of you would like to represent your own chapter in a similar capacity, you will be interested to know that Daniel Jansenson, AIA, would like to hear from you. Jansenson, who has worked with us as Local Advisor from AIA Los Angeles, has agreed to assist us in a special capacity as Local Advisor Coordinator. Jansenson will not only help us keep in touch with everyone, but he will also manage the effort to expand the program to several other chapters. We welcome Jansenson to his new mission.

For the second year in a row, Masterspec has materially supported our work with a co-sponsorship of our "Annual Brochure Exchange" at convention. This reception and review of marketing materials is a convention highlight. If you are traveling to New Orleans, be sure to put Saturday, May 17, 5:30 p.m.-7:00 p.m. on your calendar. You may win a copy of the Masterspec Small Project Edition. Our thanks to Masterspec for their support.

Lastly, we extend our sincere appreciation to departing Advisory Group Chair, Rosemary McMonigal, AIA. McMonigal has worked tirelessly on our behalf for three years. McMonigal is, how shall I put this, somewhere between three and six feet tall. When she stands up for your interests, however, she is head and shoulders above the rest. Meeting her high standards, both professional and personal will certainly be a challenge for all new Forum leaders.

The Client List

*David C. Hughes, AIA
Columbus, Ohio*

As a sole practitioner for fifteen years and having a firm size that varies between one and four people, small projects have been the constant. Certainly we all strive for that first or next big project that will lead to "bigger and better" projects. However, they are almost as elusive as white elephants, and at times the struggle to win those projects can mire your firm in a "Catch 22" situation. The financial resources to develop serious marketing efforts and build staff sufficient to solicit and service larger projects are limited. Yet without larger projects (or indeed a greater number of smaller projects), the opportunity to pool sufficient funds is never realized. The challenge is, therefore, to successfully market the small firm based upon the successes of the small projects and to put the firm in a positive position to rise to the next level of project scope and financial reward.

There are probably as many marketing techniques as there are architectural projects. Often it seems as though we have tried them all: direct mailings, specific projects, informal interviews, top 10 target lists, home shows, SF254/255, marketing consultants, advertising, newspaper and magazine articles, and interviews, mostly to no avail. For each firm, the financial and non-productive time commitment can be substantial. Success from any of these marketing efforts, for this truly small firm, has yet to be realized. So on what technique, what endeavor, what skill do we hang our future?

In all aspects of our professional endeavors, we are cognizant of the fact that our current and past clientele are our most important asset. To that end, we strive to provide our clientele with professional service that goes well beyond the limits of any contract. Be it a sounding board for current issues, a source for advice or direction, or most important, a

prompt response with a keen interest in the client and his or her situation. When we provide quality work, diverse in scope and fair in price (which does not mean cheap), we have positioned ourselves so that we may be called upon time and time again. And without hesitation, we, too, can call upon our clients as the core of our marketing effort either to solicit their next project or to be referred to new clients.

On a monthly basis, we update our client list with all the pertinent data available on the client, his project, when last contacted and when to make contact again. Depending on the client, we may not make the next contact for a year, or it may be the next month. In any case, we have scheduled a time to make that contact. And when we do, the substance of the contact is with the interest of the client in mind, rather than with a "What is in it for me?" attitude. If the contact strikes a chord with the client that results in new work, great. We always let them know that we are interested in them and what they are doing.

Over the years, I have found that marketing aimed at increasing clientele for the small firm is a daunting task, and one that produces few results. However, marketing directed to past clients, and friends and associates of past clients, is fruitful and even pleasurable. Indeed, as knowledge of your professional ability and trust in your care grow, so does the scope and frequency of your projects.

Client Debriefings

*Kathleen Hudson, MBA
Detroit, Michigan*

The most valuable marketing information is often revealed after the client has awarded a project. Whether you were successful or not, learning how clients perceived your marketing effort for a particular project is critical to future success.

Feedback taken directly from the client can drastically improve future proposals and presentations. Effective debriefings will point out strengths and weaknesses of your entire marketing approach, from the first phone conversation to the final formal presentation.

Techniques. For firms that engage in a large number of marketing efforts (over 100-150 per year), mailing surveys to clients may provide valuable quantifiable information that can be tracked over time to monitor improvement.

Firms looking for more in-depth information about fewer marketing efforts, may find telephone or personal interviews more effective. These debriefings are appropriate for major efforts involving strategy development, detailed proposals, and formal presentations. Depending upon the client, interview debriefings usually last one hour and can be held over lunch, in the client's office, or over the telephone.

Who should perform client debriefings? Despite their good intentions, many firm owners or principals rarely conduct debriefings. This is acceptable since there are several advantages to a designated marketing representative personally conducting interview debriefings.

- Control of the process lies with the person who is central to incorporating improvements for the next marketing effort.
- The marketing representative portrays an unbiased image, seeking help to improve his/her approach (as opposed to some

technical staff, who may appear defensive).

- If feedback is filtered through technical staff, it is subject to personal interpretation before it reaches the marketing representative.

Questions. How the questions are asked is equally important, if not more so, as the questions themselves. Using humor and lighthearted conversation can be helpful in making the client feel at ease. The marketer should make it clear that the purpose of the debriefing is to gain insight into the client's opinion of the marketing effort, not to argue with the client's decision.

Being a good listener and asking open-ended questions are the ingredients of a successful debriefing. The most effective questions are:

- Prepared in advance
- Tailored for each interview
- Specific.

To help jog clients' memories, start by asking questions regarding the beginning of the marketing effort and move forward chronologically. (Sample questions for a client debriefing follow this article.)

Disseminating Feedback. As marketers, it is our responsibility to communicate the clients' feedback to two important groups: first, to the team who worked on the marketing effort, and second, to the people who will influence future marketing plans.

In some cases these may be the same people, especially in smaller firms.

The best way to do this is in writing. Notes taken during the interview should be organized, typed, and distributed to the team, with copies going to other influential individuals, such as principals or even consultants named for a project. Team meetings to discuss in more detail the reasons why the firm was selected or not selected are also helpful.

Once the information has been shared, the system is now in place for continual improvement. Some changes can be put into place immediately, because, many marketers will already be well into the next major marketing effort.

Sample questions for a client debriefing (as given by an A/E firm):

1. Going into this particular marketing effort, what were our firm's perceived strengths and weaknesses? (e.g., design capabilities, management capabilities, quality of our documents, knowledge of this type of project)
2. How did our references on previous projects influence the selection process?
3. How did our team's experience with similar project types compare to our competition's?

4. How would you rate our written proposal compared to the others that were considered? Can you share the evaluation criteria rating with us?
5. How did our presentation compare to others?
6. If you could have changed anything at all in our presentation, what would it have been?
7. Did we address the selection committee's most important selection criteria during our presentation? Did we miss anything?
8. What kind of impression did our presentation team make on the selection committee members?
9. Did we bring the right people?
10. Can you tell us how our fee compared to others?
11. What was the key reason our firm was selected or not selected?
12. What improvements could you recommend in our approach to this proposed project?

Kathleen Hudson is manager of marketing at Albert Kahn Associates, Inc., Detroit, MI. She is a member of the SMPS-Michigan Board of Directors and has been active with the chapter since 1989.

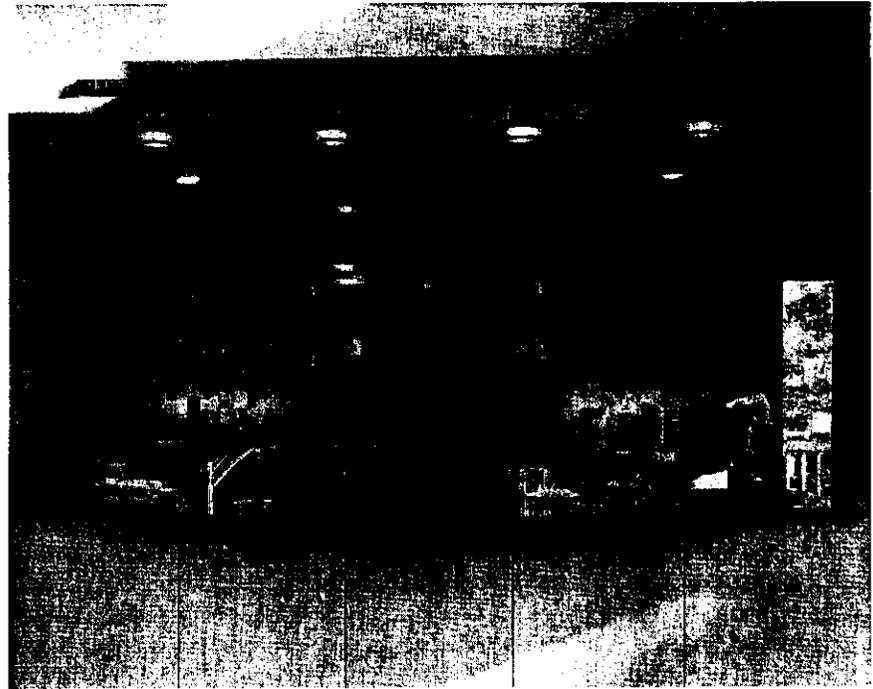
Guerrilla Architects

Laura Montllor, AIA
Port Washington, New York

I am far from a natural salesperson and was taught virtually nothing about marketing at architecture school (Carnegie-Mellon). For survival, I have read many marketing and business books. One of the first was Jay Conrad Levinson's book *Guerrilla Marketing - Attack*, in which he lists the "100 Guerrilla Marketing Weapons." His premise is that small businesses can be like combat guerrilla warriors and achieve success with little capital expense and a lot of creative effort. This resourceful approach is well-suited to small architecture firms. And he motivates us by telling us, "Your bank account will brim with profits in direct proportion to how your marketing arsenal brims with these weapons".

So, I tried one weapon, an *on-site job sign*. The first one cost about \$75. Within the first month, it pulled in five new contacts and one \$150,000 renovation job. This sign is still in use five years later and continues to be a real success.

Architect: Montllor Box Architects



Architect: Montllor Box Architects

When I read Levinson's book, I was already using another of the 100 Guerrilla Weapons: *lectures*. I teach evening continuing education classes to homeowners at local high schools. These lectures cover renovation basics: how to set priorities, evaluate alternatives, find good contractors, and understand what architects do in the process. It took a significant initial investment of time and effort

to organize the lecture materials, but relatively few changes will keep the information current from year to year. Several excellent clients have come directly from these courses. In fact, teaching is how I got my first large home renovation project. It has also established the firm's reputation and achieved a type of *brand-name recognition*.

Conversely, some of our first attempts at newspaper advertisements were real wastes of time and money. I spent hours designing large beautiful ads that were informative but expensive to run, even once. There was *no* response. Since then, I have subscribed to the notion that repetition is the key to successful advertising. We now use small size ads that are inexpensive enough to run weekly for three months at a time. We focus our efforts seasonally in the spring and the fall, when most renovation work is done. Also, we run them only in very local neighborhood papers that reach our specific residential market niche. Still, the ads rarely generate calls on their own, but many people do mention that they have seen them.

Our firm has always been prepared and diligent about documenting projects. Luckily we were ready

when opportunity knocked and *House Beautiful* magazine showed interest in one of our projects. We were featured on the cover in the Winter 1996 issue. Although, there have been no commissions as a direct result, it is an excellent selling tool. Obtaining national exposure has added a great deal of credibility and accomplishment to our firm's reputation. Interestingly, being published also led other magazines and a cable TV show to print our work.

By far the most important aspect of our marketing plan is our on-going relationships with former clients. Referrals are the source of most of our projects. Our clients live in the observable finished product and have experienced the benefits of our architectural services. They also have power to influence friends and neighborhood acquaintances. In return they want and deserve our on-going attention.

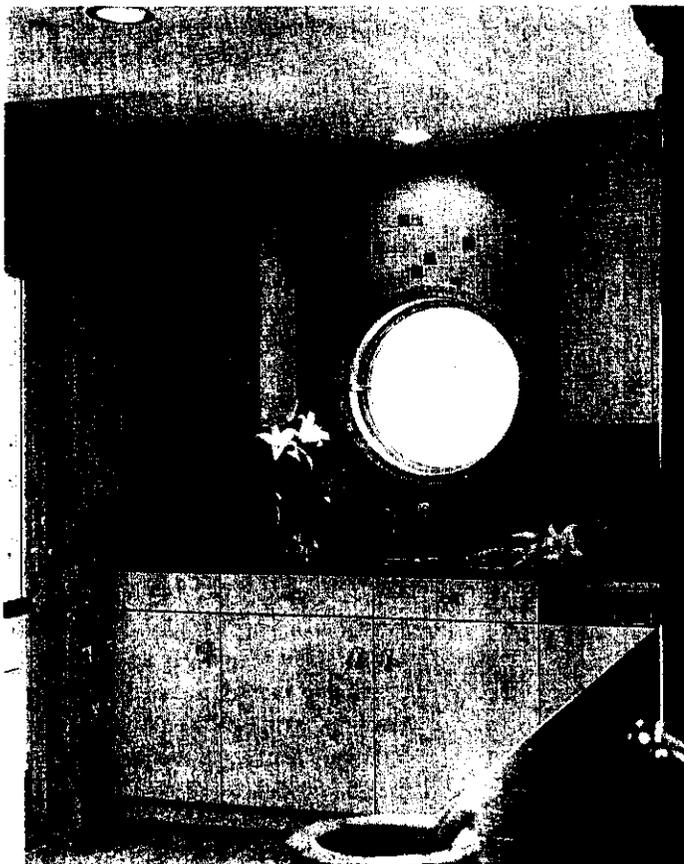
For any referral, no matter what the outcome, I send a thank you note and/or call. I will use any excuse to call a past client, such as noticing that they painted their front door a new color. I frequently make friendly calls just to keep up. To track calls, I use a computer based contact manager program that is part of my MYOB (Mind Your Own Business) accounting software. This approach has produced a great sense of customer loyalty. I treat my clients as patrons and recognize the value of their unflinching support. I voice my appreciation to my past clients and call them "*marketing specialists.*"

Like most architects, we are dogged in keeping our portfolios updated. We are visual people and correctly feel that photos of our work are our best marketing tools. I am vigilant (some say frantic) about documenting construction phases and taking final shots. Levinson (in military terms again) calls this

prepared attitude "*combat readiness.*" Realistically, other types of marketing often take the back burner. Pressing work loads on immediate jobs constantly seem to take priority which makes it difficult for the small firm practitioner to develop the combat readiness attitude toward other types of marketing.

One thing we have done, however, was to develop a *yearly marketing calendar.* The calendar gives us an overview of all our marketing efforts. It tracks our successes and failures and allows us to budget expenses. We update it every January, when our work load is usually slow. The calendar is linked to our computer agenda, and it is easy to schedule marketing production hours like any other job. To be honest, we do not always complete every item or meet every deadline, but we do on about 75%. I would recommend a marketing calendar in addition to (or in lieu of) a marketing plan. The calendar acts as a good reminder that consistent marketing is essential to running a profitable office.

Photographs are courtesy of Montllor Box Architects, Port Washington, New York.



Architect: Montllor Box Architects

On Marketing: Shaping Client's Experience of Project Delivery Process Lets You Shine

Gail S. Andersen, AIA
AIA Minneapolis

Ensuring a positive experience for the client is at the heart of marketing during project delivery. Attention to detail, follow-through, creating opportunities for dialog with the client, and turning challenges into exercises in professional expertise all can play to your marketing advantage during project delivery. This is your client to keep or lose, and more often than not, you can sew your own fate with the impressions you have given by substantial completion.

Marketing and nurturing good client relationships should be a natural part of project delivery. Some of that time, talent and money usually reserved for "marketing" can be applied during project delivery as effective strategy for getting the next project. As the architect you are in the best position to promote your client's next architect. Attention to details, providing construction process tour guiding, sensitive and personable construction administration and painless problem solving will give your client a positive experience of the building process and a sense of confidence in your firm.

The most important component of marketing during project delivery is attitude: yours, your staff's and your client's. You can take an active role in shaping these attitudes toward a positive outcome, because client satisfaction is measured in more than just on-time/on-budget parameters. This involves seeing the big picture of what really makes a successful project that will foster repeat business. How well did you accommodate your client's staff? Did the project cause unnecessary stress in their day? Did you reassure your client about the project "coming together"? Did you burden your client with unnecessary details,

conflicts, or issues related to construction? These are some of the intangibles that produce or prevent repeat opportunities. Pay attention: your client will let you know how you are doing.

Some clients will not build more than one building; nonetheless, word of mouth is still one of an architect's best links to potential clients. Be sure that the word on the street about your firm is positive and attractive. This means leaving a good feeling with a client after project close-out, sending out communications materials, and calling periodically to check up on the building and client. This keeps your name in front of the client and reminds him or her, when enjoying the space you have helped create, that you would do a good job for friends, acquaintances, or business associates. Even one-of-a-kind-building clients are an essential part of your marketing network. They should receive the same on-going interest as multi-project clients during project delivery and occupancy.

While it's always gratifying to be able to point to the grand design of the completed project, when fostering a repeat relationship, it is more important to be tuned-in to the client's wishes. Outlet locations, paper towel sizes, number of coat hooks, etc. are the things that will matter to your client and his or her staff day after day. They are, however, a little like cutting the lawn or taking out the garbage: done well, no one notices; left undone and they are a source of daily irritation.

During preparation of construction documents (CDs) be sure that "all those little details important to your client get included in the documents. Listening carefully and then noting follow-up actions go far toward

reinforcing the value and quality of your services. Meetings with the client during preparation of CDs show you are listening and responding. Review of in-process documents needn't be technically overwhelming for your clients but should give them a good sense of involvement in the details that will affect their operations. This is good time also to invite key personnel, especially if they haven't been involved in programming and schematics, to take a hard look at those "daily details." Keep good meeting notes of their input and how the items will be addressed and then be sure to follow up.

The bidding process and construction period can be a time of uncertainty and insecurity for your clients. Construction is not their expertise; AIA contract documents for Applications for Payment, Change Orders, Field Directives, etc., can be daunting. What about lien waivers, builder's risk, bid bonds? It's your client's money: He or she is interested in where it's going.

You can be a guide through the process. While you may not have included this in-depth service in your fee proposal, consider it part of your marketing budget. Be proactive in describing the process before bidding and construction commence. This is a great way to extend communications, build trust, and foster respect for your knowledge. Give your client a basic understanding of what to expect and how the process works before situations arise which may catch your client off-guard and possibly put you on the defensive. We all benefit from clients who are more educated about the construction process, so why not start close to home?

Construction administration (CA) is probably the least appreciated and most litigated portion of an architect's services. A client's eyes can glaze over at volumes of esoteric memos flying across his or her desk documenting minutiae of the project. While it is important to keep your client up-to-date on the work, a sensitive architect will gauge the

level of interest and sophistication of the client regarding technical issues and provide user-friendly communication about job site issues. Especially for issues requiring input or a decision from the owner it is best to present clients with a meaningful summary of construction issues; they will be pleased if you can guide them through the jargon so they can make responsible decisions.

You should reach a comfort level with your clients about how involved they want to be in meetings about the project. Preparing a meeting agenda a couple of days in advance allows your clients to determine which issues are of interest and how much time to set aside for the meeting. It also gives you a chance to offer background information about the issues at hand so the client will be up to speed. They will appreciate your knowledge and assistance in preparing for unfamiliar topics.

It is fairly common, even in smaller offices, for the construction administration to be performed by an individual other than the principal or the design architect who have the initial relationship with the client. Along with the general orientation to a project during the internal "hands-off," construction administration personnel should be enlightened about the client's values and goals for the project. The CA individual should be trained to represent your office on-site as a marketing presence. The owner is bound to show up on-site with questions and sometimes expects a guided tour. CA personnel who operate from a marketing

perspective can frame these encounters as positive experiences for the client.

The CA personnel from your firm should be personable, good listeners and exhibit concern for the client's interests on-site. The firm principal should be made aware by CA personnel of the client's on-site concerns and comments within a reasonable time frame. Then you can take the opportunity to call the Owner with follow-up advice, resolution or whatever information is needed. The client will know that you care and are involved even though there is a new face on the job site representing your firm.

Construction administration presence and attitude is even more visible on owner-occupied remodelings. Not only is the client on-site every day but so is his or her staff, watching everything. It is a great opportunity for you and your CA staff to shine as problem solvers, knowledgeable professionals, and team players with the contractor to finish the project. Be careful not to disrupt the productivity of the staff, but also be aware that they will notice if you are listening and doing things that are important to future work. It is not uncommon for today's staff to be tomorrow's branch manager looking for a good architect.

Conflict resolution can be a sticky issue but also presents opportunities to market your skills. Initially, most clients are not interested in placing blame, they just want something done right. The more painless you can make it for clients to get what they

need or want, the better overall perception they will have of the project. Try to resolve thorny issues prior to meetings, and then bring recommended solutions to the table for decision by the client. This reduces airing of dirty laundry over esoteric construction issues in front of the client. It also will impress the client with your negotiating skills.

Every project has changes requested by the owner as well as those little things overlooked in construction documents. Try to address these items directly and promptly. Architects must make judgments about directing staff time to cover an issue. This can cost DPE time, but the expenditure is productive if we keep in mind that these solutions represent a marketing effort beyond the scope of work of one specific project.

Attention to detail, providing construction process tour guiding, sensitive and personable construction administration, and painless problem solving will make the building process a positive experience for your clients and will give them confidence in your firm. Architects spend a lot of their most precious resources (time, talent, and money) on getting the next job in the door. Usually, we think of this as synonymous with getting the next new client. But how are we treating the clients we already have? Your next best client may already be in your office.

Gail S. Andersen, AIA is President of The Andersen Group Architects, Ltd., and is past President of AIA Minneapolis (612) 593-0950.

TIPS AND TECHNIQUES

Marketing: Do it every day!

*Rosemary McMonigal, AIA
Minneapolis, Minnesota*

A key part of any marketing effort is consistency. Every day, I spend time marketing no matter how busy I am. It may be as simple as jotting a thank you note to a past client for a referral or making a short call to a magazine editor about a recently completed project. Frequently, we step up efforts, from preparing large proposals to attending trade shows to designing and building a dog house for DIFFA.

We take pride in articles written about our clients' projects and the firm. To quote Harry Beckwith, principal of Beckwith Advertising & Marketing, "There are 25 peaks in Colorado higher than Pike's Peak. Name one. Get ink."

Everyone in our office markets; we don't have a marketing department. Our marketing starts with answering the phones and following up on leads. It continues with making the time to see that the job site sign is designed and installed; taking that sketch of an upcoming project and including it in an advertisement; sending concise, enthusiastic, proposals to potential clients; calling people back promptly; placing our names in the right directories; developing great identity pieces; sponsoring benefits; donating services; and last but by no means least, thanking clients. We all market. Every day.

Identifying a Market Niche -Socio-Economic Trends Affecting Small Practice

*Gabriel Durand-Hollis, AIA
San Antonio, Texas*

Among a number of trends predicted to affect small projects is the positive move toward a custom single-family residential market. Futurists Alvin and Heidi Toffler point out in their latest book that the home is growing in importance again after years of de-emphasis. For example, for years, homes and yards got smaller. Even meals and congregating took place outside the home. Now with computers, work is again done in the home. Home theater, home schooling, even birthing and home health care are growing rapidly. The home will need to adapt and adjust in size for the new uses.

Will there be money to pay for it? Economists point to the age of baby boomers who are at their peak earning and influence years (age 45-55) and will be for the next decade. With fewer children than their parents and more affluence, the economics point to demand and available cash to have a strong custom single-family market for the coming years. Look around in your area for opportunities.

Passive, Yet Effective

*Rachel Simmons Schade, AIA
Philadelphia, Pennsylvania*

Now in my ninth year of practice and second year of a partnership, work continues to arrive from a variety of sources. With regard to marketing, I am a strong believer in more passive techniques and have learned to enjoy the slower periods as a time to recharge, read, relax, and relate to my family.

Having a partner makes it easier to solicit business at social functions from people you might not otherwise have approached. With a good arm to lean on, I'm much more apt to talk up our firm. Soon I'll be joining a local group for executive women. We attended a meeting before the holidays and were impressed by the way all the women professionals offered support to one another.

Neither my partner nor I am comfortable with cold calls, but when introduced to a potential client, we talk enthusiastically about our qualifications for the work proposed. In fact, almost all our work has come from referrals from people who have worked with us or who know someone that has.

When asked without warning to submit a proposal, we've found that the client generally is only interested in broadening the field and may even have already chosen his or her architect. From these experiences, we have learned to follow through on leads more carefully, making sure to find out as much about a potential project as possible. And no matter what the outcome, we always follow up with the person who recommended us.

TIPS AND TECHNIQUES

Client Impressions

*Alan Keith Barley, AIA
Austin, Texas*

What happens after you have your initial meeting with a potential client? The procedures you follow can determine whether you win or lose the project.

When a potential client walks out your door, immediately prepare a thank you card with a personal, handwritten note signed by the principals of the firm and get it in the mail. Follow up with a phone call a few days later and inquire how the selection process is proceeding. If this particular client wants to build a house, I offer to review the property with them. However, I ask to be paid a consultation fee for the visit. You can refund the fee if you get hired. If the client is interested in a specific building type or construction technique, twenty minutes of quick research and a half dozen photocopies mailed to the client will go a long way towards making your firm stand out. In other words, you are demonstrating to the potential client your interest in them and their project.

After being selected for a project, we at Barley and Pfeiffer Architects ask what made our company stand out from the competition. One of the more frequent answers is "your firm seemed to be the most interested in wanting to do our project." When a potential client feels you are personally involved, you have begun to establish a rapport with them. In their minds you are the architect who will be the easiest to work with. Now, it is only a matter of time before you are in contract negotiation, and you have done your best to kick off a project on a positive note.

Marketing Tools

*Carolyn M. Honan, AIA
Princeton, New Jersey*

Since most of our work comes from either referral or repeat business, we have found that one of our most effective marketing tools is keeping in touch with our previous clients. We do so by following these common sense methods:

1. *Holiday Cards.* We print postcards of an image from one of our completed projects for use in our Christmas/New Year's card mailing to clients, consultants, friends, and contacts. Although this may sound too simple for true marketing success, we've found otherwise. It lets people know that we are still here and in business, even if we haven't worked with them in several years (something not to be overlooked since two of our founding principals are near retirement age). It lets our clients know the variety of projects we do and that we are not just a "residential" or "historic preservation" firm. We get a great response from our holiday cards and often see them pinned up long after the holidays are over.
2. *Personal Notes.* Again, since much of our work comes from referrals, it really pays to make a special effort to send a handwritten note whenever the occasion arises: a family event (marriage, birth, etc.), an article in the paper, an award, whatever!

3. *Schedule Time.* We have spent years discussing marketing schemes to use and the most effective has been to schedule time (we agreed on lunch once a week) to discuss our plans and, more important, to implement them. In the past few weeks, we have talked about everything from web page possibilities to the color of the stamp we should buy. We also use this time to write notes, organize mailings, etc. More has been accomplished during these lunches than during many months of "we should" discussions combined.

For our firm, these methods have given us a marketing boost. We are still trying to develop an official "marketing plan" and hope to add another summer mailing to our agenda. In the interim, however, we will continue faithfully with these tools since they have given us great results.

Focused Marketing

*Donald Wardlaw, AIA
Oakland, California*

How should one market the services of a small firm or a firm doing small projects? Mass mailings? Bus stop bench ads? Radio announcements? Newspaper advertisements?

If these questions seem naive, I should point out that a few years ago it would not have occurred to me to distinguish between advertising and marketing. Perhaps I was not alone. In five years of architecture school, I never heard the word marketing. But I now recognize the distinguishing marks of both advertising and marketing. And where one will gobble resources, the other can grow a firm.

The difference, I think, is that advertising lets people know what you do and how to reach you, while marketing lets particular people know what you do and how to reach you. Now some of you may have had your share of particular clients, but that's not what I meant!

Part of the challenge of marketing in our business context is to reach the people one wants to have as clients. Another important consideration is to avoid the expense of reaching those who are not likely or desirable prospects.

Focused marketing means knowing who one wants to reach, how to reach them and what to say. This normally requires some analysis and some imagination. The analysis part might involve writing a marketing plan wherein one might explore questions like these which I found in *Guerrilla Marketing* by Jay Conrad Levinson (which is also referenced in Laura Montllor's "Guerrilla Architects" article in this Report):

- What do I do well? What do I do poorly?
- What objections will/do my prospects have about me/my company?
- How am I/my company like my competition?

- What do I do differently from my competition?
- What special skills/abilities do I have to offer my clients? Is my service a real honest-to-goodness benefit?
- What traits characterize my past clients?
- How does what I want to do differ from what I have done?
- What have I learned as a result of my past experience?
- Who can lead me to new clients?
- What methods exist for getting work (what do other people do)?
- What are some common products (marketing materials)?
- How much can I afford to spend on marketing?
- What niche do I intend to fill?
- Does my service offer a benefit my target audience really wants?
- Does my service truly separate me from your competition?
- Is my service unique or difficult to copy?
- How will I reach new prospective clients?
- How will I foster an ongoing relationship?
- How can I reestablish contact with people that can lead me to new work?
- How will I reward those who lead me to new work?
- How will I distinguish between tire kickers and real prospects?

The imagination part is more difficult to prescribe. The ignition source for a creative spark remains a mystery. Fortunately, Nature seems to have piped architects for fuel delivery. We are clever types.

To link these ideas about marketing with the practice of it, I asked a few friends and colleagues to share examples of marketing that is for them tailored and successful. Their replies follow.

"I think mass mailings are a clueless marketing strategy. I decided to see if I could get some of my work published in *Sunset Magazine*, which I thought would be seen by the people I might want to work with. I called them and was referred to an

editor who asked me to send some photos of my work. They liked what they saw and arranged to photograph and publish some of my work. I received several calls and one good commission from the effort. Now, of course, I have a relationship with an editor and an opportunity to have future work published there also. From this experience, I learned two things. First, only people who had some familiarity with my work and liked what they saw called me. That's a great way to begin a client relationship. Second, always arrange to be present with the magazine photo crew when they do their photography."

*Alex Bergtraun, AIA
Emeryville, California*

"My practice includes both historic preservation and new work that has a strongly historic aesthetic. My interest in historic art forms includes early music (Baroque and earlier), which I enjoy performing and hearing. I belong to the San Francisco Early Music Society, a non-profit organization that seeks to further research, education and performance of early music. Their motto is 'historically informed performance.' Their directory includes many ads for performers and music related services. While I think that ads are seldom effective, I placed an ad in the directory stating that I do 'historically informed design.' I thought that the people who looked at the directory were much more likely to appreciate the sort of work I do than the general population. Some months later I had a message on my machine from a couple who wanted 'a gothic mansion by the ocean.' I am now at work on this project thanks to a simple ad focused for a specific population."

*Kirk Peterson
Oakland, California*

“When I founded my own one-man firm over 10 years ago, I decided that residential remodeling would be the focus of my practice. To find clients who were likely to remodel their homes, I decided to present a class at Piedmont Adult Education School, the local adult education facility, which I hoped, by the title, would attract people who might be thinking of remodeling and who might, therefore, have use for an architect. After providing a detailed course outline to the school, I was engaged to provide a Saturday afternoon, four-hour course entitled, ‘How To Avoid The Pitfalls Of Home Remodeling.’ My course was low-key, informative and without any ‘hire me’ sales pressure. It did allow people to get comfortable with me and understand better the value of hiring an architect. People often would ask me for my card at the close of the course. I follow up with

personalized mailings in which I include copies of newspaper articles I have written on home remodeling and a cover letter wherein I reiterate my availability should they need additional assistance. (The follow-up mailings are key; they have probably doubled the response rate over the years.) I have continued to offer courses over the years at a variety of venues including local libraries. To promote them I send out press releases to the local papers. The results have been fabulous. The course not only gave my practice the jump start it needed, it also provided an ongoing source of work for many years.”

*Richard Morrison AIA
Menlo Park, California*

“Maintaining a strong network of satisfied clients can be one of the best forms of marketing. For over a decade I have hosted an annual garden party and open house to

which I invite past clients, potential customers, their families and friends. Since I’ve poked all over their homes, it’s only fair that they see mine (although I keep *my own* closets off limits). My house and garden are works in progress, and this helps to show off my design ideas and personal tastes. Former and future clients chat with each other, which also reinforces their connections to me. Shortly after a party celebrating my newly remodeled kitchen, a contractor sent a new kitchen project to me. Other people have RSVP’d to miss the party but have then hired me. For the cost of printed invitations, stamps, and a good spread of food and drinks, my clients are reminded of me and my company in a very positive way every year.”

*Catherine Roha, AIA
Berkeley, California*

Engraved pens anyone?

Profile

Schade and Bolender Architects

*Rachel Simmons Schade, AIA
Philadelphia, Pennsylvania*

In Issue Number 8 of the Small Project Forum *Report*, I wrote about a transformation my firm was going through. Now with the beginning of a new year, the transition is nearly complete. My sole proprietorship is (or will be at the time of this appearance) a new entity, something Pennsylvania is learning to recognize as a registered limited liability partnership (LLP). While the LLP has been around for some time in other states, Pennsylvania seems to have accepted it more slowly. The paperwork, as far as the state is concerned, is much more straightforward (so we're told) and the legal protection is greater, and we won't have to be taxed as a corporation.

At the time of the last writing, I was in the process of trying out the new relationship with my new partner. I recommend this trial period for anyone considering a move of this sort. It is a great way to see how well you'll get along, and doing it for more than a short period probably means you'll go through both up and down periods. Both can be very enlightening.

Last September, I received the Young Architect Award from the Philadelphia Chapter of the AIA. This was followed by an article in our local paper titled, "Making Her Mark in a Mostly Male Field." It didn't go into great detail about what we really do, but there were some good photos, and lots of people we know saw it. Most of them called to



New House in Casco Bay, Maine; Rachel Simmons Schade, Architect
1996Photo: © Tom Bernard

say how much they liked it, only one was a call about a potential project (it didn't pan out). It did, however, go a long way toward making our past and current clients feel great about us, and we'll include it in marketing brochures to potential clients. Media begets media, I'm told. Next month we'll be in a local arts magazine about one of four Philadelphia artists to watch.

Last July, work was completed for our first house from the ground up (picture). It is located in an underdeveloped part of southern Maine, right on the coast. My godmother inherited the land and a magnificent shingle style "cottage" just down the lane from our site. She and her husband wanted a year-round house that they could have for their family and friends who visit all summer long and

for them to stay in longer into the winter months. I started work on it over two years ago, not sure I was up to the task of such a large project, but it turned out to be one of the most harmonious relationships between owner, contractor, and architect I've ever experienced. It seemed that all the knowledge I'd gathered over the years was used to make it come together: all the sketches in margins of notes taken during lectures, all the quotes drawn from novels I'd read, all the great spaces I'd been in through all stages of my life. When first presented with the idea of getting to design this house, I thought it was too early in my career, that it was more appropriate for someone later in life. I hope I'll get to do another one some day, but if I don't, I'll always have this one.

Local Advisor Development

*Daniel Jansenson, AIA
Los Angeles, California*

Friends and colleagues,

It is my great pleasure to accept the Small Projects Advisory Group's Gabriel Durand-Hollis' invitation to function as the Local Advisor Coordinator for the next two years.

The hard work put in by Hy Applebaum, Rosemary McMonigal, Cynthia Pozolo, Donald Wardlaw and many other members and supporters has created a network of nearly twenty Local Advisors around the country who regularly contribute information to our newsletter, communicate the Forum's efforts to local colleagues, and generally function as important conduits of information among members of the Forum and outside participants.

The practical, real-world expertise of the group's members, and the open way in which this information is shared, has attracted increasing attention in the profession in general, and the AIA in particular. The Advisory Group's goal is to expand the Local Advisor program to a core group of about 35-40 architects. This would give us an opportunity to improve our publications and, by extension, the Forum's reach to higher levels of quality. It's a simple equation: more active participants = better information for us all. My job as Local Advisor Coordinator will be to maintain close contact with the members of the Local Advisor network, help manage changes among current Local Advisors, and expand the network's membership, especially in those chapters that have a high level of Forum membership but few Local Advisors (please see the list at the end of this article).

A biographical note: with about thirteen years in the profession, I've had the opportunity to work at an extensive array of firms, from tiny two-person offices to 700-employee corporate design firms. My experience includes residential design,

corporate interiors and office buildings, retail and community development projects, and extensive work for the film industry. Located in Santa Monica, California, I currently work (by telecommute) with a strategic facility planning firm in Oakland, California on corporate facility-planning projects, and operate my own small firm that helps start-up companies create and outfit their first offices.

I am eager to connect with any Forum member on any topic, but especially with regard to the Local Advisor network. It is my plan to contact Local Advisors on a regular basis to see how the Forum can provide better service, information, and support to members. This is an exciting and interesting time to be a small project practitioner, and I look forward to speaking with many of you in the coming weeks and months. If I or any members of the Advisory Group can be of assistance in any way, please call or write immediately. I can be reached anytime by telephone, at (310) 828-3501, or by e-mail, at: danielj@aol.com, or danielj@leonardo.net.

Addendum

We are seeking Local Advisors in the following chapters:

- AIA North Carolina
- AIA New York Chapter
- AIA Birmingham
- Washington Chapter AIA
- AIA Central New Jersey
- AIA Westchester/Mid Hudson
- AIA Southeast Wisconsin
- AIA Orange County
- AIA Rochester
- AIA South Carolina
- James River Chapter AIA
- AIA Miami

If you are a Forum member at any of these chapters with an interest in becoming a local advisor, please do not hesitate to contact me. I will send a description of local-advisor activities and responsibilities and will be happy to discuss arrangements, support, etc.

1997 Convention

*Cynthia Pozolo, AIA
Detroit, Michigan*

Check out the following events at the 1997 Convention scheduled for May 15 through 18, 1997 in New Orleans, Louisiana. Activities listed are sponsored by the Small Project Forum.

Programs

Well Controlled Chaos: Time and Project Management for Small Projects and Small Firms

James Franklin; May 15, 1997, 8:45 a.m.-11:45 a.m.

Negotiation as a Core Skill: What Small Firm Principals Need to Know

James Franklin; May 15, 1997, 12:15 p.m.-3:15 p.m.

The Successful Practice of Residential Architecture

Susanka, Maurer, McMonigal, May 16, 1997, 3:45 p.m.-5:15 p.m.

Tapping for Dollars: Small Computers for Marketing Promotion

Huw Roberts, May 16, 1997, 4:00 p.m. - 5:30 p.m.

Fourth Annual Convention - Brochure Exchange

Saturday, May 17, 1997, 5:30 p.m.-7 p.m. Bring your marketing materials for some feedback from peers and professionals! Always fun and informative.

SPF Local Advisor and Member Roundtable

Gather to meet fellow members of the Small Project Forum. Location and time to be announced.

Sole Practitioner's Breakfast

Sunday, May 18, 1997, 7:00 a.m.-8:00 a.m.

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If you would like to report on issues relevant to the Small Project Forum from your area on a regular basis, we invite you to join our network of local Advisors. Please call Daniel Jansenson, AIA.